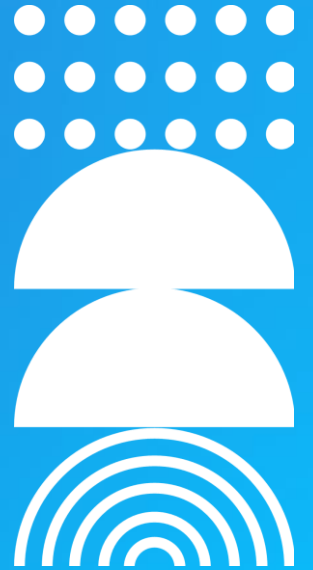# HESA Data Futures: Reducing Burden

Helen Ferneyhough, Ellucian, Product Manager

Helen Bailey, Digital Platform Manager (Banner), University of Central Lancashire

Andrea Baldini, Data Developer Strategic Planning and Change, Nottingham Trent University

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HESA Data Futures: Reducing Burden

AGENDA

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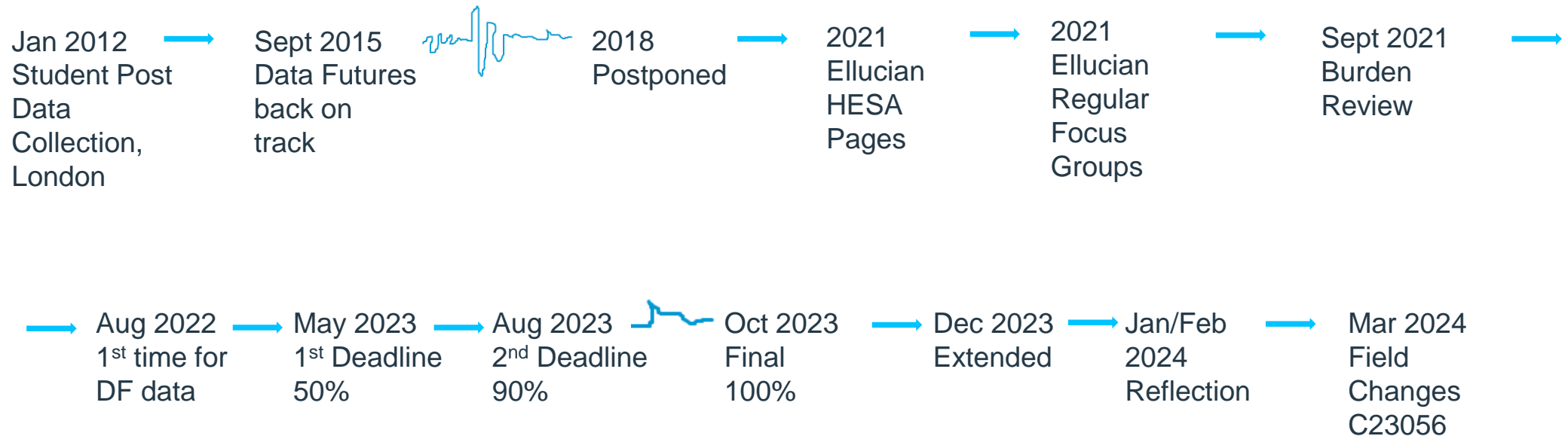
Overview from Ellucian

Helen Ferneyhough

- Product Manager mainly responsible for Regulatory HESA and Student Loans Company
- Joined 20 months ago to provide additional support to HESA data futures working alongside the UK and Ireland team
- Previously employed by Staffordshire University for over 30 years

- **linked in** : www.linkedin.com/in/helen-ferneyhough
- **email** : helen.ferneyhough@ellucian.com

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Data Futures – Key Milestones

Where did it all start?

Jan 2012 Student Post Data Collection, London → Sept 2015 Data Futures back on track → 2018 Postponed → 2021 Ellucian HESA Pages → 2021 Ellucian Regular Focus Groups → Sept 2021 Burden Review →

→ Aug 2022 1st time for DF data → May 2023 1st Deadline 50% → Aug 2023 2nd Deadline 90% → Oct 2023 Final 100% → Dec 2023 Extended → Jan/Feb 2024 Reflection → Mar 2024 Field Changes C23056

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Journey to Submission

Key Areas

- Understanding and Guidance
- Stop Start Project
- Gap Analysis Review Processes
- Agile as not fixed model
- What is a SCS?
- Partnership and Collaboration

Unpacking the Entities

Getting to know the entities

- Module
- Session Year
- Qualification
- Venue
- Course
- Student
- Engagement
- Student Course Session
- 2022

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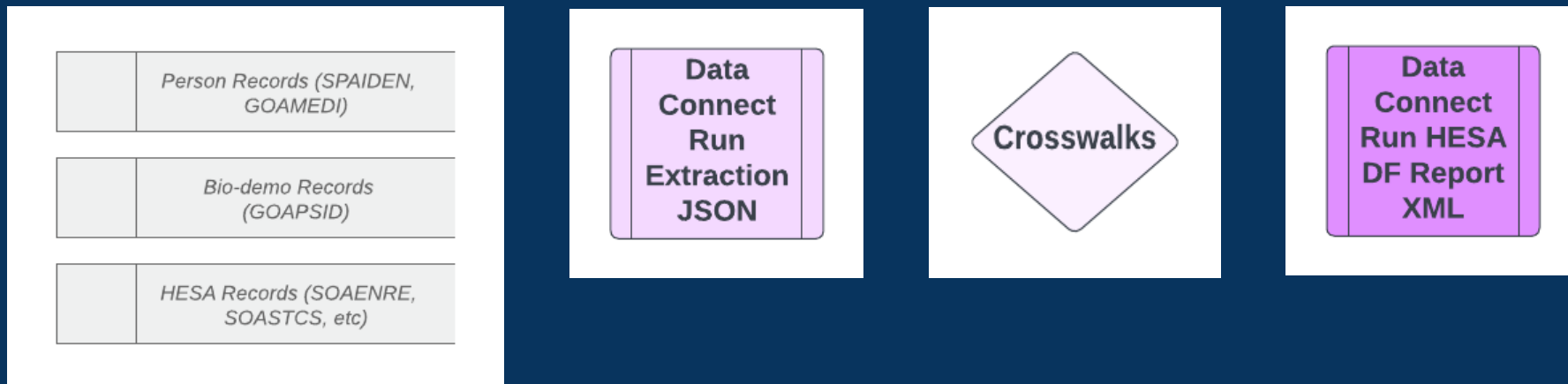USER CONFERENCE | Europe
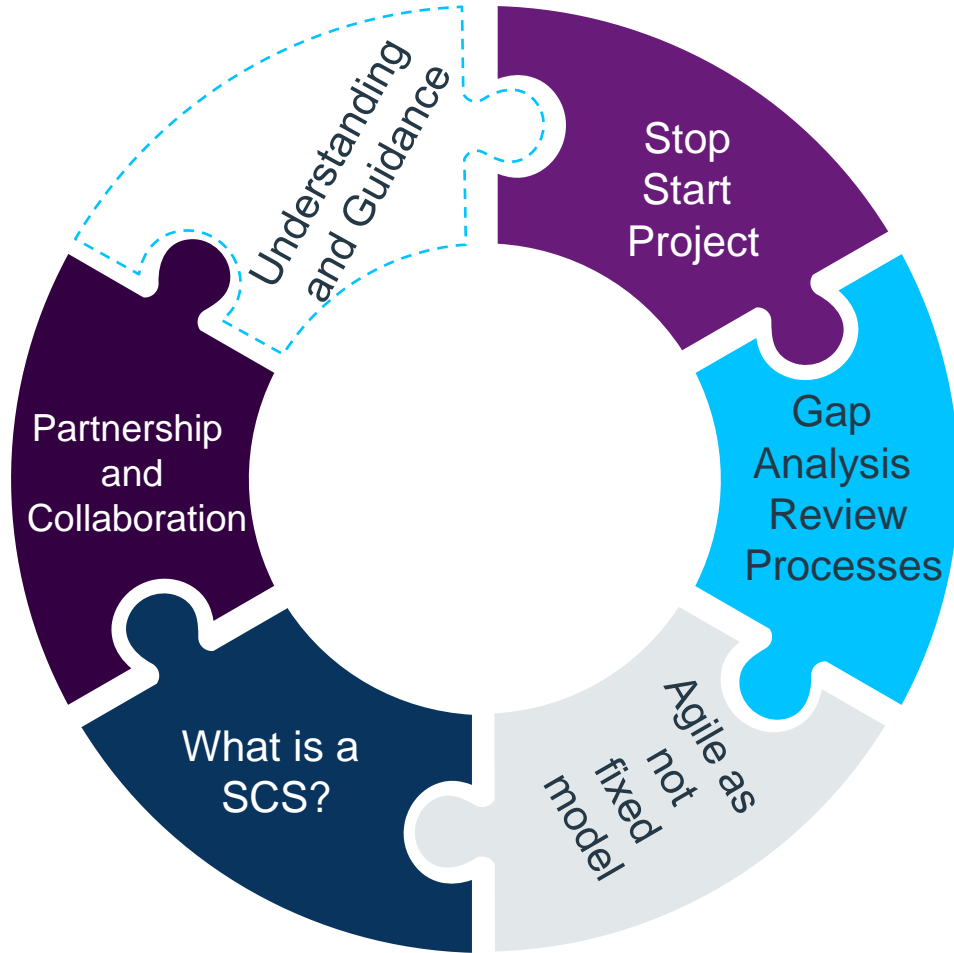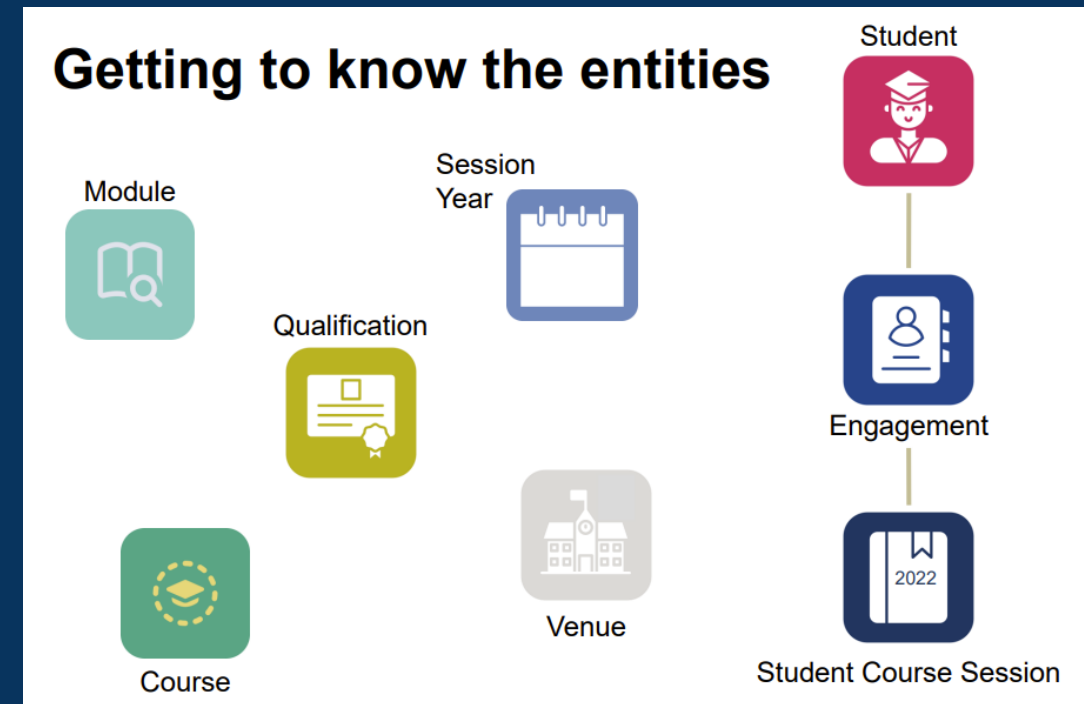
Data Connect - Pipeline

- Enabled combined pipeline between products to increase productivity

- Fast and more flexible way to deliver necessary regulatory integrations

- Enables coverage of transactional data to be implemented

Legacy HESA Student and HESA Alternative Provider Return (Pre 2022)

Agreed in 1993 to create a new framework HESA

Became business as usual

Each year few extra fields/values

Model in the main standard

Early notification of changes

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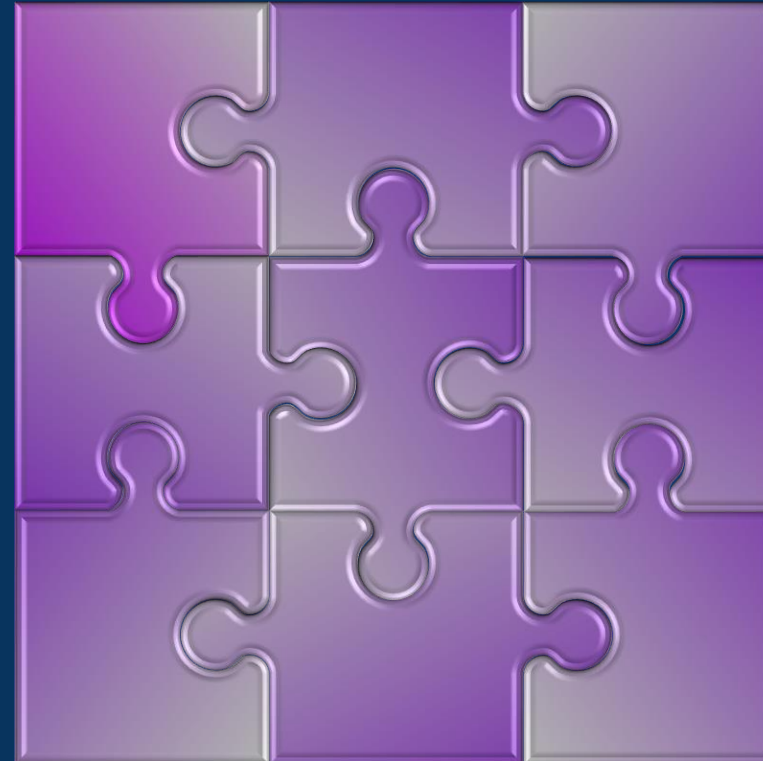# Legacy HESA Student and HESA Alternative Provider Return (Pre 2022)

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HESA Data Futures

- Issued with a new data model
- New entities
- New fields and values
- New concept of reference period
- New concept of student course session

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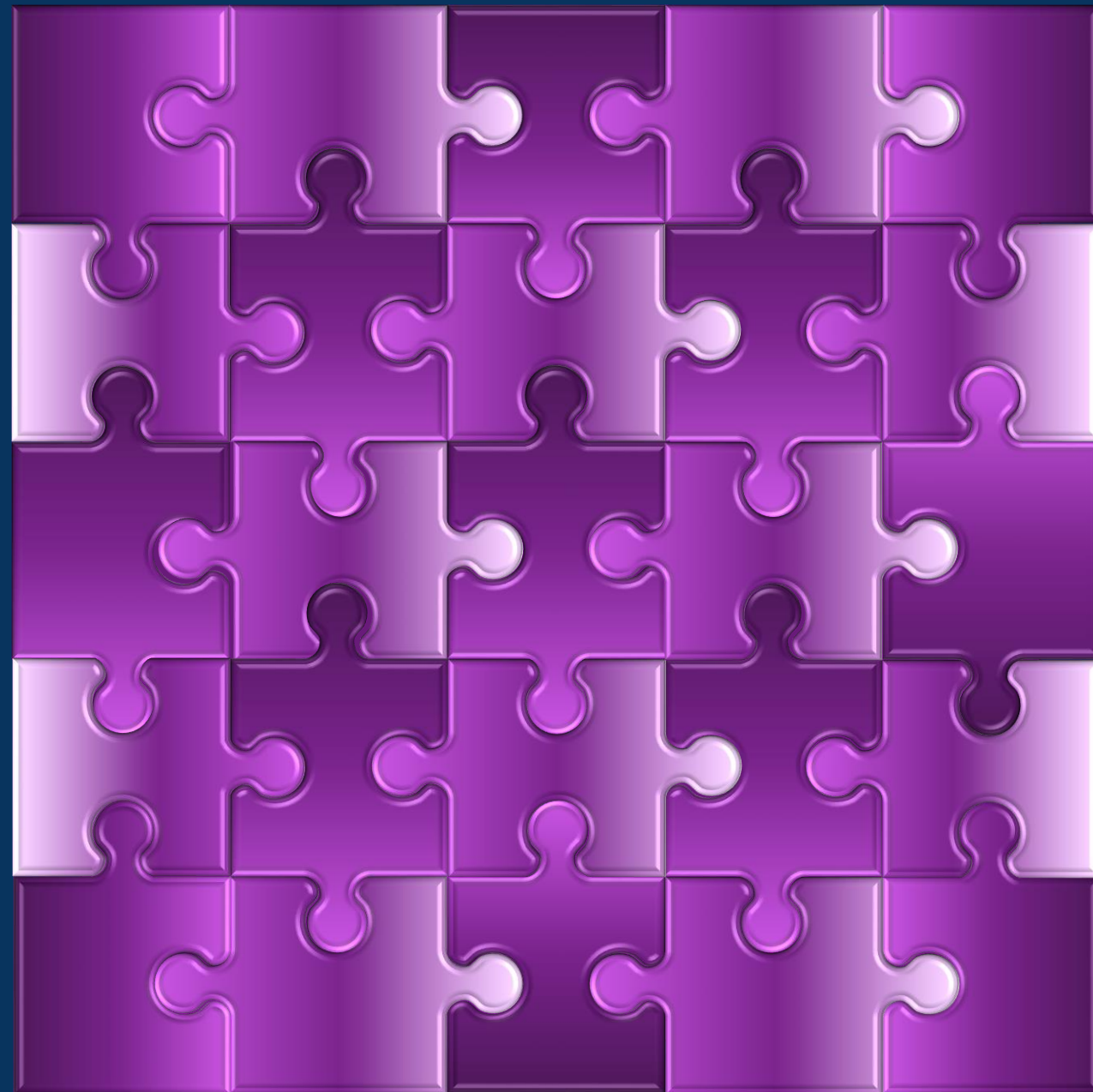USER CONFERENCE | Europe

HESA Data Futures

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Ellucian Developments 2022/2023

COVERAGE

Changing model and guidance

FLEXIBILITY

Crosswalks

TRANSFORM

XML pipeline

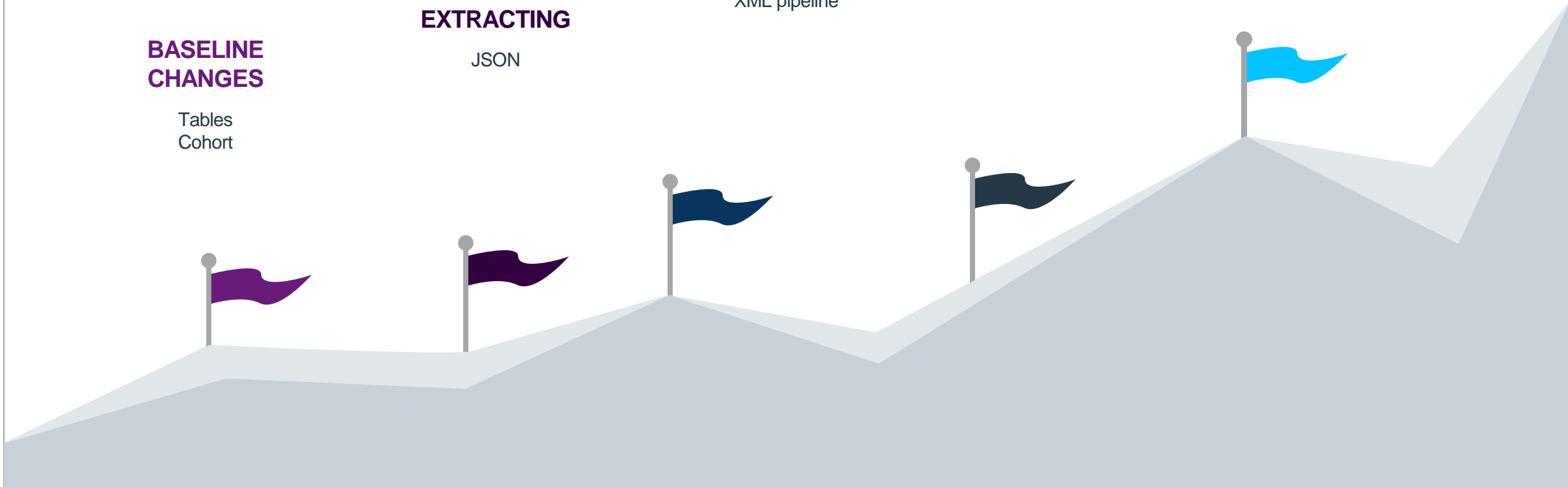**EXTRACTING**

JSON

BASELINE CHANGES

Tables
Cohort

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Ellucian 2024 Planned Developments

- REFLECTION

- PIPELINE

- COVERAGE RULES

- COHORTS

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Helen Ferneyhough

Key themes moving forward

- Continue to support and embed the Student Return

- Monitor carefully changes to AOR, ITT, Discover Uni and Graduate Outcomes

- Continue to look for new ways of working to increase productivity, improve accuracy and try to reduce the burden of regulatory returns

- Work alongside DFE on the new ITT return

- Await the independent review

- Continue our relationship with HESA

- Most importantly continue to collaborate with yourselves

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Approach from University of Central Lancashire from an IT perspective

Helen Bailey, Digital Platform Manager (Banner), University of Central Lancashire
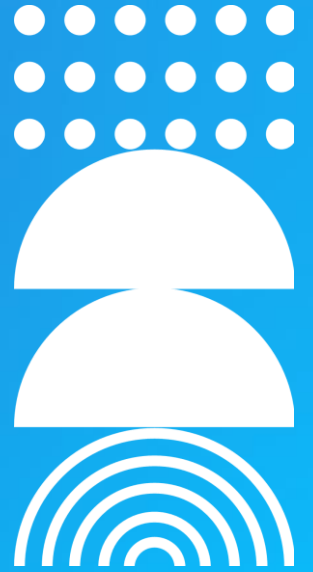
HESA Data Futures

- Return 29,500 Students to HESA

- Multi Campus Delivery, Burnley, Westlakes
  and Cyprus and now recruiting at UCLan London

- UK and Overseas Partnership Provision

- All students 37,000

- Diverse Academic Portfolio, multiple intakes including:

- Clinical Provision, Medical and Dentistry Schools, Nursing, Paramedics, Social
  Work and Midwifery

- Degree Apprenticeships

- Research Degrees

- Vet School new 202324 Academic Year

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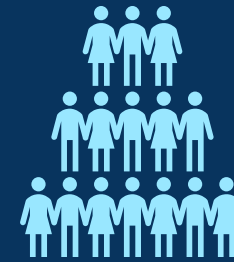
How it Started

Assemble the HDF team!

Architect (IT): 0.5

SME (IT): 0.75

Systems Analyst (IT): 0.75

Developer (IT): 0.75

Contractor Role (IT) 0.2

HDF Project Officer (IT/Business)

Head of Returns (Business)

Returns Officer (Business)

Returns Administrator (Business)

-- NEW STAFF 2023—

Dedicated Business Analyst (IT): 1.0

Dedicated Systems Analyst (IT): 1.0

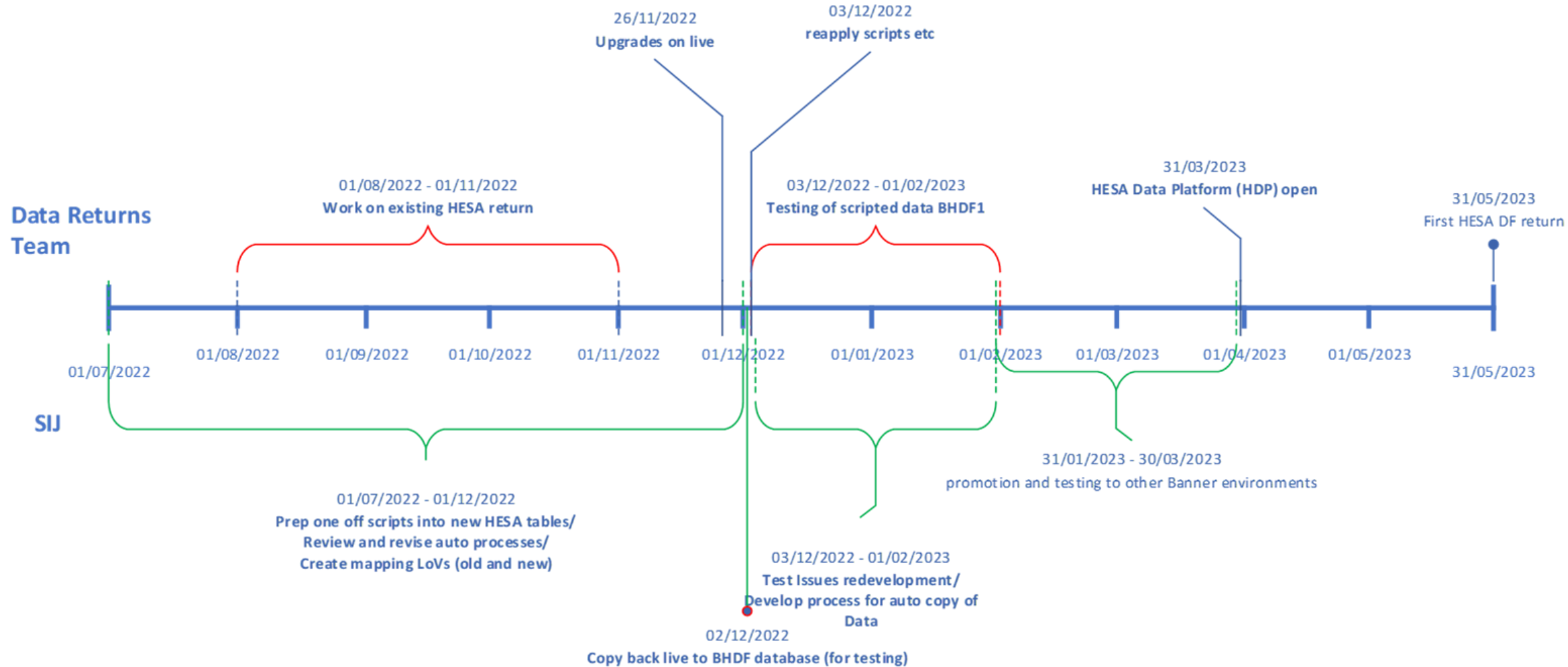**Extra Developer Resource (IT): 0.5**

Ways of Working

- Used Agile Methodology

- IT and Business working together as the HESA Data Futures Team

- Overall timeline created but worked in 2 week sprints

- We were able to review timelines and pivot quickly when issues arose

- Iterative Agile Development

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UCLan Milestones - May

May Return

Data Returns Team

26/11/2022
Upgrades on live

03/12/2022
reapply scripts etc

01/08/2022 - 01/11/2022
Work on existing HESA return

03/12/2022 - 01/02/2023
Testing of scripted data BHDF1

31/03/2023
HESA Data Platform (HDP) open

31/05/2023
First HESA DF return

01/08/2022   01/09/2022   01/10/2022   01/11/2022   01/12/2022   01/01/2023   01/02/2023   01/03/2023   01/04/2023   01/05/2023

01/07/2022

31/05/2023

SIJ

31/01/2023 - 30/03/2023
promotion and testing to other Banner environments

01/07/2022 - 01/12/2022
Prep one off scripts into new HESA tables/
Review and revise auto processes/
Create mapping LoVs (old and new)

03/12/2022 - 01/02/2023
Test Issues redevelopment/
Develop process for auto copy of
Data

02/12/2022
Copy back live to BHDF database (for testing)

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Our Approach….

May Return

- **Analysis of old tables to new**

- **Mapped at a field level old to new where possible.**

- **Review existing scripts/cron jobs for majority of Students**

- **Create triggers on the database**

- **Began working on Scripts to populate the new HESA Tables in Banner**

- **2 Full Banner Upgrades on Live in May**

- **Set up of Ethos Data Connect**

- **Focused on passing Schema**

August and December

August passed submission from May's return

Upgraded Cloned DB with latest Release

Cloned a copy of Production Database 31st July

Set up Experience Data Connect on Cloned Environment

Locked all users out apart from returns team & Data Management Team

Updating Data via manual entry and script

Biggest challenges understanding Student Course Session and the relationship between that and Module Instances

Aligning Dates

Review and Resubmit, More Scripts

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How it ended……

- Lots of submissions to understand and correcting errors BUT……

- Submitted and Signed Off

- HESA Record still remains in Cloned Environment

- Now need to work on how to get the data from clone to Production

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Next Steps?

Review our 2023 approach with a Retrospective

Work ongoing with the Architect Team

Learn from Ellucian and Other HEI's

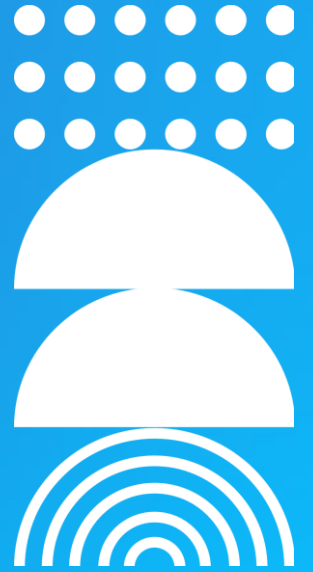**Reduce the Burden for our Returns Team and Data Management Team**

Question Ambiguities

Analysis of what exactly does a Student Course Session really mean?

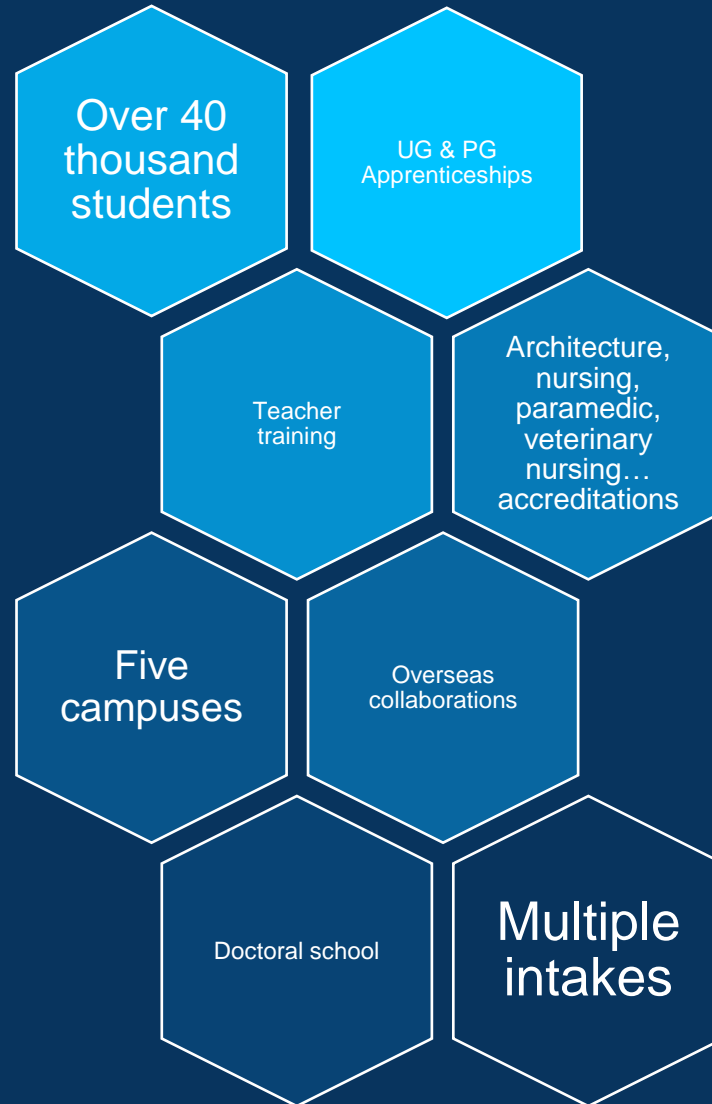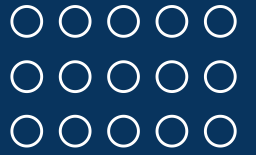ellucian | **Europe**
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Approach from Nottingham Trent University

Andrea Baldini, Data Developer Strategic Planning and Change, Nottingham Trent University

Teaching provision at NTU

Over 40 thousand students

UG & PG Apprenticeships

Teacher training

Architecture, nursing, paramedic, veterinary nursing… accreditations

Five campuses

Overseas collaborations

Doctoral school

Multiple intakes

Outline

- Business processes

- Technical tools

- Approaches

- Challenges
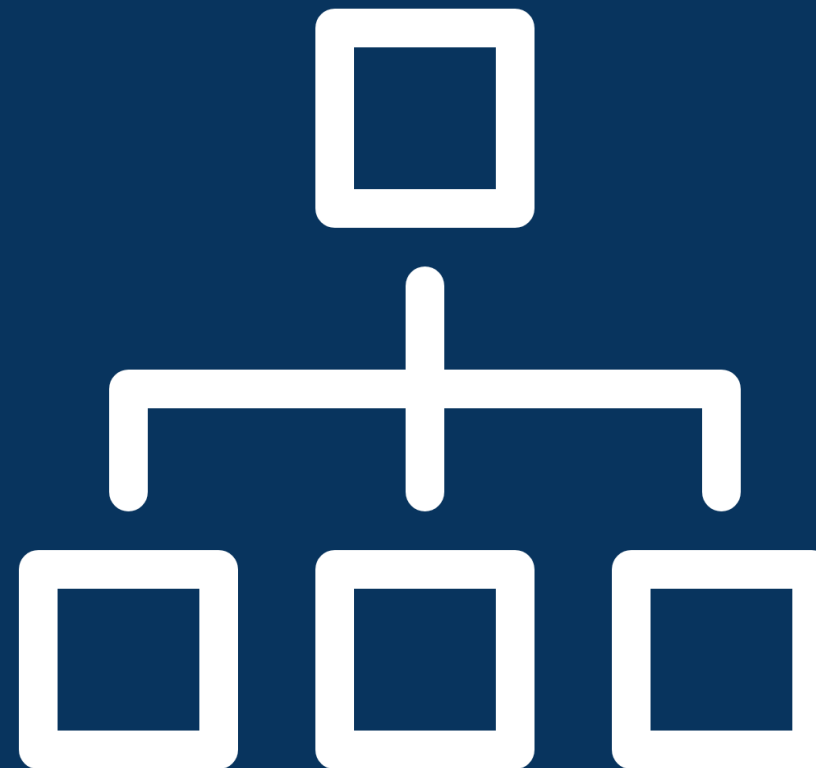
Business processes

Online enrolment

- Creation of a new GOAPSID report
- Review and update of picklists

Course build

- Revision of pro forma
- Re-coding of Banner "loader" to populate new HDF pages

Withdrawal/Break in Study workflows

- Revision of process
- Specific focus on dates

Technical tools

Student Course Session rollover

- When a record rolls from admissions to student

- When a record rolls from one year to the next

Transformations

- Definition of transformation logic for most HESA fields

- Development of SQL code

- Implementation of a MDUU tree to run the transformations (purge, insert or update)

Data load

- Data upload via csv files (with table primary key and field to update/insert)

- The csv file is uploaded to the server and the process is run via a MDUU tree

Approaches

A few highlights

- SCSESSIONID equal academic term

- SGACHRT "From term" represents the highest academic term within the Engagement.
  - This field was then used to join to baseline tables

- Reliance on SKAPMYR (course year attributes) to inform our SCS transformations

- Logic targeting any SCS falling within the reference period

Nottingham Trent University
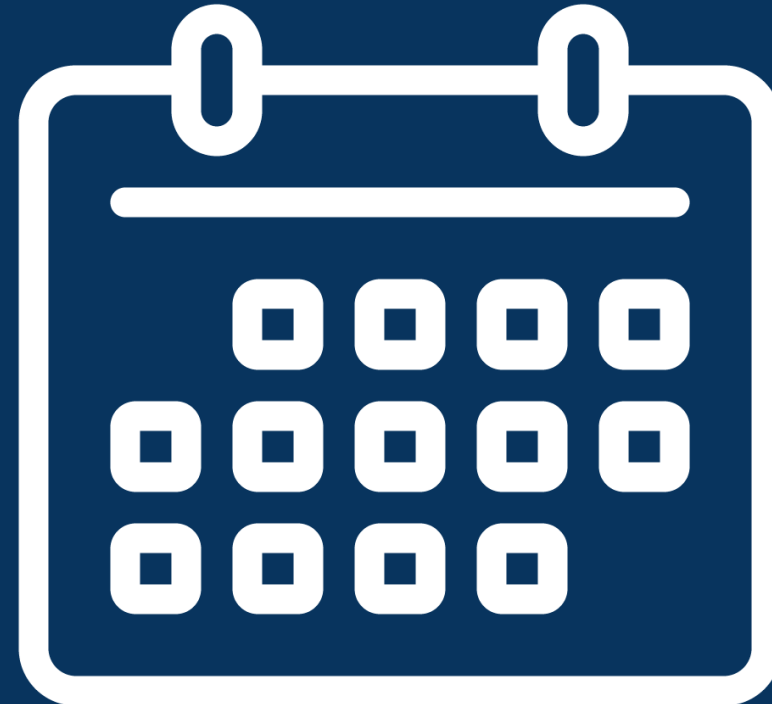
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Challenges

Dates

- HDF model driven by dates

- SCSSTARTDATE: assumption introduced into the model

- Largely notional Module Instance dates

- Careful consideration to dormancy

Errors

- Largest number of errors related to STULOAD

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Questions

email: **helen.ferneyhough@ellucian.com**

join Banner UK and Ireland Forum